|  |
| --- |
| FORM N: SCHEDULING AND TIME CARD REQUIREMENTS |
| Instructions for filling out Form N: Proponent Proposal - Requirements   1. Complete Form N: Proponent Proposal - Requirements 2. Follow the proposal instructions in the Proposal Instructions section below |
| **PROPOSAL INSTRUCTIONS**   1. **For each Non-Mandatory requirement indicate which Proponent response code that best describes the proposed scope of your solution:**   **Y – Available Out of the Box:** the solution for the requirement is currently available in the existing product “out of the box”. Configuration may be required to enable the feature (requirement will be met through changes to settings of tables, switches, and rules without modification to the source code). Requirement is installed and operational at other sites and can be demonstrated to the City of Winnipeg.  **C – Available via Customization:** the solution for the requirement is not currently available in the existing product “out of the box”, but will be incorporated via customization of the solution components. Requirement will be met through changes to the source code which would require analysis and re-application during updates, upgrades, or when applying software patches.  **F – Future Availability:** the solution for the requirement is not currently available, but will be available in an upcoming planned product release. If this option is indicated, include the date/timeframe when the requirement will be available for implementation, which should be either:   1. A planned release up to 3 calendar months after the RFP. 679-2019 competition close date, where an additional Proponent response code of **3** should be provided; 2. A planned release up to 6 calendar months after the RFP 679-2019 competition close date, where an additional Proponent response code of **6** should be provided, or 3. A planned release up to 12 calendar months or longer after the RFP 679-2019 competition close date, where an additional Proponent response code of **12** should be provided.   **3 – Third Party Supplied:** the solution for the requirement is expected to be met by using a third party proponent’s existing product, either integrated or non-integrated.  **N – Not Possible:** the solution for the requirement will not be provided by the Proponent.  3. For each requirement in which the City has noted as “Please Describe”, and/or asked specific questions, Bidder shall include additional information, referencing the specific Ref #, at the end of the section and/or as appendices. **Ref # is highly important to ensure linkage between requirement and description.**  **Notes:**   1. An omitted response will be assumed to be the same as a response code of “N”. 2. Any deviation from the response code will be re-coded at the discretion of the City of Winnipeg. 3. Responses of Y, C, F and 3 to mandatory and non mandatory requirements assumes the requirement is in the scope of the Proponent’s proposal and will be included in a budget proposal if the Proponent’s proposal is short-listed. |

| 1. **Non-Mandatory Requirements** | | | |
| --- | --- | --- | --- |
| **Requirement Description** | **Requirement Information** | **RFP**  **Ref#** | **Proponent Response**  **(Y,C,F 3,N)** |
| **1. General Requirements** | | | |
| Staffing system should be a single source of data entry wherever possible. | Users should not have to enter information multiple times in the system. | G1 |  |
| The system should provide a function that allows testing to verify business rule accuracy and effect prior to implementation |  | G2 |  |
| Should be able to define organization or departments. |  | G3 |  |
| Should be able to define units within an organization or department. |  | G4 |  |
| Should be able to define an unlimited number of shift patterns within the system. | Shift patterns should be related to permanent shift or ad-hoc shift schedules. | G5 |  |
| Each unit should be able to have its own set of business rules defined. | Fatigue rules  How is overtime is assigned? | G6 |  |
| Each business rule should have fields to allow for the tracking of Effective Start Date and Effective End Date. The start date should be utilized to show when the rule takes effect and the end date would indicate the date that the rule was retired. | This should allow for changes to be made in advance and take effect on a specific date (for example when a new contract comes into effect) It should be possible to enter a start date and leave the end date blank until the end date is known (for example contracts can be extended or carried forward during negotiations) | G7 |  |
| The system should provide a means to update and modify existing business rules, collective bargaining rules, and operating protocols and to schedule its implementation based on a date and time and set of criteria. |  | G8 |  |
| Should be able to assign colour code to specific shifts defined in the system |  | G9 |  |
| Should be able to define positions within each organization or unit |  | G10 |  |
| Should be able to associate requirements, criteria or capabilities to a defined position. |  | G11 |  |
| Should be able to define "bank" amounts that can be carried over to the next year. | This includes personnel vacation banks, gratuity banks, etc. Fire doesn't carry over banks Paramedic carry over some banks but have different rules for different banks. | G12 |  |
| It should be possible to define sub codes for payroll codes | Record an Overtime payroll code with a sub-code that represents the reason for the overtime.  Record miscellaneous code with a sub-code for specific reason | G13 |  |
| It should be possible to require the use of sub codes with certain payroll codes. | For example if the payroll code of OT is used, a sub code would be a mandatory field. | G14 |  |
| The system should allow an unlimited number of user-defined working and non-working codes and sub codes. |  | G15 |  |
| The system should allow the system administrator to create pick lists and shift patterns along with other required system information fields that are viewable by one or more agencies. |  | G16 |  |
| The system administrator should be able to define the retention period for system data. |  | G17 |  |
| System should allow for archiving system data. |  | G18 |  |
| System should prevent users from one agency accessing data for another agency unless authorized |  | G19 |  |
| System’s reporting feature should prevent users from one agency accessing data for another agency unless authorized |  | G20 |  |
| System should allow certain data and/or functionality to be shared across agencies e.g. scheduling rules, calendars, etc. based on configurations defined by the system administrator or designate. |  | G21 |  |
| System should allow for each agency to have their own staffing rules based on their own collective agreements |  | G22 |  |
| System should allow for an unlimited number of rules |  | G23 |  |
| System should allow for the definition and scheduling of holidays recognized in the various contracts. |  | G24 |  |
| It should be possible to assign holidays to pre-defined shift patterns. | Holidays recognized by unions may differ, so it is important that the system be flexible enough to linked to some employees but not all. | G25 |  |
| The system should allow for multiple jurisdiction configuration. |  | G26 |  |
| should be able to associate an agency defined position number to a defined staffing position. |  | G27 |  |
| should be able to assign a person to a defined position (and position id). | This would be the person's permanent spot (until the next staff alt). | G28 |  |
| should be able to track the history for each position numbers. |  | G29 |  |
| should be able to track multiple position numbers for one position. |  | G30 |  |
| Should be able to link file, images, or other attachments to a record. | Attachments to be stored on WFPS designated network. | G31 |  |
| **2. Personnel** | | | |
| Should be able to track multiple date milestones for each employee such as hire date versus start date versus seniority date |  | P1 |  |
| Should track the history of positions held by each employee |  | P2 |  |
| Should be able to associate skills/qualifications with each employee. Skills are then utilized to match employees to positions. | Should be good if this could be added in from the hire date start.  It should be possible for designated users to modify skills associated to a user. | P3 |  |
| It should be possible for an employee to temporarily suspend skills/qualifications based on pre-defined business rules. | For example, an employee should not be able to act in a senior capacity for a period of time. As a result they should be temporarily removed from the acting list. | P4 |  |
| Should be able to capture and maintain various predefined time banks for each employee. | "Time banks include:  Gratuity  Vacation  Statutory holidays  Sick" | P5 |  |
| Should be able to track the history of all return to work or modified duty events for an employee. | Should like a notification to go to the supervisor when the DTA is in place and when it ends. | P6 |  |
| Should be able to mark an employee unavailable and associate the appropriate unavailable code (payroll code). | Should be able to record appropriate payroll code to the status (long term sick, WCB, return to work, etc.).  Unavailable status should be visible in all views so it is easily seen by all users.  Status should have an optional expiry date field which if used would change the user back to available status on the specified date. | P7 |  |
| System should be capable of allowing users to electronically submit requests for use of accrued leave including anticipated accruals for vacation and holiday as well as notice of availability of special assignment and overtime availability. |  | P8 |  |
| Employee should be able to modify their personal information and notification preferences through a telephony or web based user interface. |  | P9 |  |
| The system should be capable of automatically receiving basic personnel data from an external database such as a staffing solution. |  | P10 |  |
| The basic personnel data should be consumed by the RMS and automatically create a personnel record using (Including but not limited to) the following information: | * First Name * Last Name * Common Name * Rank * Shift * Assignment | P11 |  |
| The system should allow for the manual entry of personnel as required. |  | P12 |  |
| There should be a mechanism for tracking career information including but not limited to: | * Rank assignment * Date of promotion * Position held | P13 |  |
| The system should allow for tracking medical information against a personnel record. | Information should be controlled by security so that only authorized persons have access to the information. | P14 |  |
| The system administrator should be able to define certain roles and assign personnel to those roles. | Roles should allow users to be added to specific picklists such as Investigator, Inspector etc. | P15 |  |
| Each personnel record should be linked to any certifications that are assigned to each person. | Certifications should include the date it was earned and, if applicable, the date that it expires. | P16 |  |
| If someone has both a personnel record and a user account, the two should be linked. |  | P17 |  |
| From a personnel record, a user should be able to identify all events that person has been linked to including but not limited to: | * Incidents * Training * Inspections * Public Education | P18 |  |
| The system should allow for tracking of contact information for the personnel including but not limited to: | * Primary phone number * Secondary phone number * Email * Secondary email * Name | P19 |  |
| The system should be able to track drivers license information including any endorsements and restrictions for each personnel member. | Should be possible to report on various criteria including expiry dates. | P20 |  |
| The system should be able to record or link to employee skill sets or credentials to use for scheduling. | For example only Hazardous Manterial trained staff should be scheduled on a Hazmat unit. | P21 |  |
| Skills/qualifications should be visible when a user is recommended for a position and on all duty reports |  | P22 |  |
| Employee should be able to track all their time including Overtime, acting time, stat time, etc. (historical and future) | Employee should be able to run a report and have a dashboard view of this type of information. Acting time relates to promotional qualifications and therefore needs to be tracked properly.  This should also be be available in a calendar view. | P23 |  |
| The system should allow for tracking of external contacts in relation to the personnel. Contact information should include (but not limited to): | * Name * Relationship * Primary phone number * Secondary phone number * Email * Secondary email * Reg # | P23 |  |
| **3. Scheduling** | | | |
| Should have the ability for supervisor to sign off on absence and/or attendance records. | Absences should be signed by supervisor.  Acting pay should be signed by supervisor. | S1 |  |
| Overtime should be signed off by appropriate personnel. |  | S2 |  |
| Acting time should be signed off by supervisor and coded appropriately. |  | S3 |  |
| Should be able to track the balance of Stat holidays on an ongoing basis to ensure it levels out over the course of the year. | See rules around stat days and short term or maternity leave time as this impacts the allotment of hours in the various banks. | S4 |  |
| Should have option to define staffing levels for each unit type assigned to a hall. |  | S5 |  |
| Should be able to assign criteria/qualifications to each position on apparatus, in hall by shift. |  | S6 |  |
| Should be able to manage a single crew being able to be assigned to 2 apparatus (cross staffing). |  | S7 |  |
| It should be possible to define a position as mandatory or optional within the scheduling system. |  | S8 |  |
| Should allow the user to assign a specific # of hours that a person is allowed to work so that a warning is presented when they are going to exceed the # of hours. |  | S9 |  |
| Should be able to create ad-hoc overtime shifts for special events |  | S10 |  |
| Should be able to identify overtime shifts which are billable or included in other cost recovery actions |  | S11 |  |
| Should be able to create ad-hoc shifts to record shifts being worked by employees on return to work or modified duty shifts. |  | S12 |  |
| Should be possible to track "on call" personnel. |  | S13 |  |
| Authorized users should have the ability to create requests for personnel with specific skills sets to be seconded or temporarily allocated to another organizational unit. | For example, the training section should be able to request instructors or Acting Training Officers for training classes. It should be possible to schedule these in advance. | S14 |  |
| Schedules should be viewable for at least 24 months in advance |  | S15 |  |
| Should be able to alter employee's permanent position as required | Staff movements should be required on an ongoing basis due to retirements, promotions and other staff changes. | S16 |  |
| The date of the transfer should be definable by the agency. |  | S17 |  |
| Should be able to adjust staffing (ad-hoc) based on pre-defined business rules. |  | S18 |  |
| It should be possible to define business rules for retraining requirements if an employee has not been assigned to a position for a defined period of time. | For example, if an employee has not worked in a Suppression position for more than 6 months, they should receive sign off from Training before being able to work in Suppression. | S19 |  |
| Should have the ability supervisor to sign off on staffing changes. |  | S20 |  |
| It should be possible to mark a position/employee or group of employees as not available for movement or staffing changes on a given day or set of shifts. | When training is scheduled, an employee should be marked as "Do Not Move" to accommodate the training. | S21 |  |
| Should be able to view the minimum staff number defined for each hall. | Each hall has a minimum staffing levels. This number should be visible to defined user levels. | S22 |  |
| Should be able to view the minimum staff number defined for each hall and each shift. |  | S23 |  |
| Should be able to view the minimum staff number defined for each hall for time of day. |  | S24 |  |
| Should be able to view the current staffing levels for each hall and shift and by time of day. |  | S25 |  |
| Should be able to view the minimum staff for each District Area. |  | S26 |  |
| Should be able to view the total strength assigned to each hall and shift accounting for all staff permanently assigned to each hall on each shift. |  | S27 |  |
| Should be able to view all positions for each District Area or EMS district. |  | S28 |  |
| Should be able to view all officer positions for all halls. |  | S29 |  |
| Should be able to view all officer positions for each District area |  | S30 |  |
| Should be able to view all officer positions by shift and hall or organizational unit |  | S31 |  |
| Should be able to create a view of the personnel qualified to "act" in a senior capacity. | View should be able to be shown for the whole department, an organization/ department, shift or other criteria.  Should be able to decline to act in a senior capacity on a one-year basis. | S32 |  |
| Should be able to filter the view of the personnel qualified to 'act' in a senior capacity by single or multiple criteria so that the user can see only acting D/Cs or only acting Captains etc. | Filter by the one or more of the following criteria: a) Organizational unit b) Acting capacity c) Shift d) Seniority | S33 |  |
| Should be able to create a view to show upcoming vacations. | View should be able to be shown for the whole department, an organization/ department, shift or other criteria. This is also a view that should be applied to an individual user. | S34 |  |
| Supervisors should be able to view all requests for leave using defined criteria. | View should be able to be shown for the supervisors assigned staff members. | S35 |  |
| Should be able to view schedules of all employees with defined qualifications or skills by single or multiple criteria. | Filter by the one or more of the following criteria: a) Organizational unit b) Acting capacity c) Shift d) Seniority e) Specialty (qualification/skill) | S36 |  |
| Should be able to view schedules of all employees with the qualification Acting Training Officers and Instructors with specific skill sets. |  | S37 |  |
| Should allow for employees to trade shifts based on predefined business rules. |  | S38 |  |
| Shift trades should involve 2 or more employees and all related trades should be tracked. All exchanges should be recorded with the relationship to all other related trades. |  | S39 |  |
| Shift trades on Statutory holidays should be flagged so that the payroll is able to adjust any stat pay for all involved in the shift trade. |  | S40 |  |
| The system should record and display all employees included in the shift trade (who was scheduled to work, as well as the actual person who worked). | The system should alert if someone from the shift trade is booked off sick ahead of time.  The system should flag for the Platoon Chief that a sick note is required. | S41 |  |
| Should be able to track all time earned or owed outside regular work hours. |  | S42 |  |
| Earned time should be used by the end of each year. The system should provide ongoing alerts or notifications regarding status of earned and owed time for each user. | 365 days from the first shift in the trade. | S43 |  |
| The system should allow for the users to perform private shift trades. | A private trade occurs when a trade happens directly between 2 or more people. Should be based on qualifications. | S44 |  |
| Staff allocation of vacation should be managed within the scheduling system. |  | S45 |  |
| It should be possible to allocate staff vacations on an annual basis based on predefined business rules. |  | S46 |  |
| Employees, vacation requests should be placed in a "pending" type status when initiated pending approval by person in authority. |  | S47 |  |
| Employees, vacation requests should be approved by person in authority before they are accepted. |  | S48 |  |
| The system should allow for vacation bidding based on defined business rules |  | S49 |  |
| The system should allow users to trade vacation spots based on defined business rules |  | S50 |  |
| When annual leave entitlements have been assigned to a member, the system should have a mechanism for alerting the member of the assigned time and provide them a way to acknowledge the time. |  | S51 |  |
| Employee should be able to record a "book off" when they are unavailable to work. |  | S52 |  |
| When booked off, the employee should be able to record a "book back" when they become available to work. |  | S53 |  |
| Both the book off and book back processes should be able to be automated (phone or electronically) |  | S54 |  |
| When an employee books off or on, specific data should be captured | Type of leave, reason for leave (i.e. if a family illness - whom it is related to - mother, wife, child etc.) | S55 |  |
| Notifications of all book off/ons should be sent to designated supervisory personnel. | Employee's immediate supervisor should be notified.  It should be possible to turn notifications on or off on a case by case basis. | S56 |  |
| Should have a notes field where information related to the vacancy can be captured (the reason the person was off work). | Free form text to make appropriate notes of vacancy. | S57 |  |
| All requests for time off submitted by an employee should be approved by an authorized user (supervisor) before being marked as a vacancy. |  | S58 |  |
| A supervisor should be able to accept or reject a request for leave. A field should be present for supervisor to include a reason. |  | S59 |  |
| Clicking on a request in the request queue should take the user to the specific day so they can determine staffing levels and approve/deny the request | Would like a warning to be generated if leave request is going to require OT to fill. Would like a warning to be generated if leave request is going to exceed leave bank. | S60 |  |
| System should automatically track time off requests that have been approved and notify attendance and payroll as required. |  | S61 |  |
| Should be able to create ad-hoc schedules for personnel on return to work assignments. |  | S62 |  |
| Should be able to restrict Return to work shifts based on criteria provided through the Return to work process. |  | S63 |  |
| Should be able to define the appropriate business rules to determine if a vacancy can be left open or should be filled. | Criteria is different for each organization/department. Need to be able to override this if a vacancy occurs in the middle of the night etc. | S64 |  |
| Vacancies in the schedule should be presented to the user in a clear and concise manner. | Should be colour coded with a number that shows how many short. | S65 |  |
| User should be able to view the criteria for a specific vacancy |  | S66 |  |
| When filling a vacancy, the user should be able to view a recommendation for the replacement staff member based on predefined business rules including skills. |  | S67 |  |
| When recommendations are presented, it should be possible to see any cascade effect of selecting the recommended employee. | By seeing the "knock-on" impact of selecting the recommended employee the scheduler should have the ability to view any vacancies created and weigh out the most desirable action and "what if" scenarios. | S68 |  |
| User should be able to manually accept the desired personnel from the recommendation. |  | S69 |  |
| User should be able to override the recommendation and manually select different appropriate resources. | Should include:   * Optional confirmation pop-up, configurable by the administrator - confirming the user wants to override the system recommendations, * Audit trail showing the original recommendations, the manual override, user name, time and date. * A visual indication that the vacancy was filled with an override of the recommendation provided. | S70 |  |
| The system should maintain an audit trail of all rules used to fill vacancies. |  | S71 |  |
| Users should be able to run a query to display only the vacancies for specific criteria including capabilities, shift, time/date range or user. |  | S72 |  |
| Should be able to identify a fill-in of a position as billable or included in other cost recovery actions. |  | S73 |  |
| When reassigned from their primary position to cover another vacancy, it should be possible for the scheduler to mark that user as available for instances where they may be required to be moved back to their primary position. | The system should provide feedback to the users for total number of hours in a year (hours owed, time off owed etc.) when adjusting schedules from 4/4 to 5/2 etc. | S74 |  |
| It should be possible for defined users to revise a schedule after the shift has been completed. |  | S75 |  |
| Should be possible to capture electronic signatures for sign off. |  | S76 |  |
| Optional positions should be prioritized to represent the order they are to be filled in. | Minimum staffing positions should be marked as mandatory. All positions above minimum should have the option to define the order in which they are to be filled once minimum staffing levels are met. | S77 |  |
| Should allow employees to indicate the days, shifts, or events in which they are available to work extra (O/T). |  | S78 |  |
| Supervisors should be able to view an employee's planned schedule versus what they actually worked. |  | S79 |  |
| The system should allow for the users to post for public shift trades. | A public trade occurs when someone is unable to find another employee to trade with. This feature should allow the user to post the trade for any appropriate resource to accept. Should be based on qualifications. | S80 |  |
| It should be possible for the employees to request vacation time on an annual basis based on predefined business rules. |  | S81 |  |
| Should be able to associate an alpha-numeric payroll code to the employee associated to the permanent position who is unable to fill the position. |  | S82 |  |
| Recommendation should include a minimum of 5 personnel displayed in order of recommendation based on business rules. |  | S83 |  |
| **4. Education** | | | |
| The user should be able to schedule the public education event in advance. |  | E1 |  |
| The user should be able to identify all WFPS personnel that will be participating in the public education event. |  | E2 |  |
| The system should allow for the tracking of the Station, Shift (Platoon) and/or Unit that is participating in the public education event **When event is assigned to Fire or EMS Operations.** |  | E3 |  |
| The user should be able to identify the type of public education event that will be taking place. |  | E4 |  |
| There should be a visual indication as to whether or not the personnel are in service or out of service at the time of the event. | When assigned to Operations the participating apparatus should know if it is on duty, off duty or conditionally available for the duration of the event. | E5 |  |
| A designated user should be able to modify the list of public education event types. |  | E6 |  |
| The system should have a method for identifying whether a public education event is being performed by a Pub Ed officer, Operations staff, or other resources such as HR or summer students. |  | E7 |  |
| Each public education session should allow the user to track the planned duration and the actual duration. |  | E8 |  |
| The user should be able to document the organization that requested the public education event along with a contact name and phone number. |  | E9 |  |
| The system should have a way for a user to query for scheduled events they are scheduled to participate in. |  | E10 |  |
| It should be possible to schedule training sessions in advance using a shift calendar system. |  | E11 |  |
| When scheduling a training session, the designated user should be able to identify who the instructor for the session will be. | * Internal instructors * External instructors | E12 |  |
| When scheduling a training session, the user should be able to identify who the trainees will be. |  | E13 |  |
| It should be possible to assign a group of users to a training session. | Users should be able to collaborate and work together through the session.  The session is delivered to a group however the training information is recorded against the individual user. | E14 |  |
| It should be possible to assign a user to a single training session or multiple training sessions. |  | E15 |  |
| The system should send a notification to a user when they have been scheduled to participate in a public education event. |  | E16 |  |
| Each training session should have the option to include the expected duration and the actual duration. |  | E17 |  |
| When scheduling a training session, it should be possible book the following: | * Training rooms/locations * Training equipment * Apparatus | E18 |  |
| There should be a calendar of all training sessions viewable by users with the appropriate security. |  | E19 |  |
| When a user is assigned to a training session they should be notified of the training session. | Ideally by email with a pre-defined summary of the training session expectations (for example: session objective, minimum evaluation mark expected, evaluation method)  This pre-defined summary should be defined when the training session is initially created by the designated user. | E20 |  |
| **5. Reporting and Notifications** | | | |
| It should be possible to run a ad-hoc or scheduled report to display all of the employees in return to work/modified duty status. |  | R1 |  |
| A report should provide the number of hours a light or modified duty person is working to ensure they are working appropriate number of hours. |  | R2 |  |
| A report should provide a list of secondments, where they come from and where they are seconded to. |  | R3 |  |
| A report should provide a list of persons that have run out of sick time. The report is for the union. |  | R4 |  |
| A report should provide the time owed or earned. |  | R5 |  |
| Users should be able to display a daily "duty roster" style report. | User should be able to define criteria for report, such as: a) District area b) Halls c) Halls broken down by apparatus including vehicle information d) Specialty Teams e) Scheduled Training | R6 |  |
| Duty reports should contain a visual indication of any specialty skill sets for each employee. |  | R7 |  |
| Should have the ability to report all work at defined pay codes based on specific criteria. | Criteria should include: a) Date Range b) Organizational Unit c) District Area | R8 |  |
| Should have the ability to report all work at defined pay rates based on specific criteria. | Criteria should include: a) Date Range b) Organizational Unit c) Battalion Area | R9 |  |
| Should have the ability to run report on specific individuals to view their "acting" time. | Should include the option for date range in the query | R10 |  |
| Daily report should show all personnel who have booked off with the associated payroll code for the book off. |  | R11 |  |
| Daily report should show all personnel who have booked on with the associated payroll code for the book back if appropriate. |  | R12 |  |
| Should be able to produce a report showing time in a specialty position. | This could include time in positions such as Acting Training Officer, Instructor, HAZMAT, Tech Rescue etc. | R13 |  |
| Should be able to produce a report for each employee or a group of employees showing the history of each position held including time in each position. | As part of the staffing alterations, the time in position is utilized to determine if staff reallocations should occur. This report should be used when reviewing employees' career development. | R14 |  |
| Should have the ability to report on all scheduled vacations. | Should be able to narrow the report based on defined criteria such as:  a) Time/date b) Hall c) Organization/Department d) Battalion Area | R15 |  |
| Should be able to produce a report showing overtime for a specific employee or group of employees. | For example, a report showing all the overtime accumulated for employees in the FPO office as this is used to determine how overtime is allocated. | R16 |  |
| Overtime report should be able to include the daily totals for a specific period of time as well as the overall totals. |  | R17 |  |
| Should be able to create a dashboard type report for supervisors and other designated users to show specific benchmarks for the employees they are responsible for. | For example, a report that shows: Current Overtime totals Absences Vacations | R18 |  |
| Each user should be able to create a dashboard type report to show specific benchmarks for themselves. | For example, a report with total:   * Current Overtime * Absences * Vacations | R19 |  |
| Users should have the ability to (at a minimum) collect and report out specific pieces of information which are required by the payroll system. | Data requirements:  a) Payroll Code b) Code Description c) Reason sub code d) Authorizing person e) PeopleSoft ID # f) Permanent Hall g) Shift h) Confirmed Rank i) Member Name j) Acting Name  k) Location of Work l) Comments/Remarks m) WCB Recurrence Y/N n) Absence Began o) Absence End | R20 |  |
| Should be able to schedule reports to run automatically on a predefined basis. | Daily reports for payroll or management could be scheduled to run at predetermined times. | R21 |  |
| Reports can be viewed, shared, printed or e-mailed on demand and customizable. |  | R22 |  |
| Should be able to email scheduled report to defined users or distribution lists. |  | R23 |  |
| Easily view trends and monitor employees’ time and leave events as well as where labour costs are spent. |  | R24 |  |
| Should be able to define criteria and indicators to identify attendance trends. |  | R25 |  |
| Notifications of attendance trends should be able to be sent electronically to defined users |  | R26 |  |
| Create an automated shift report that can be sent to HQ. This report should include anyone on any type of leave including union leave, sick leave, WCB etc. | The report should be automatically regenerated and resent to the email distribution list when a change is made (i.e. half way through a shift) | R27 |  |
| System should support notifications to the following types of systems:   * Email * Phone * Text/SMS |  | R28 |  |
| It should be possible to define more than one of each type of notification for each user. |  | R29 |  |
| Users should be able to define at least 3 preferred methods of communication (phone, text, email). |  | R30 |  |
| Users should be able to phone a central (pre-defined) number and advise of a book off/on situation. |  | R31 |  |
| Rules should be able to be defined for when a user should report book off/on to a defined person in authority. |  | R32 |  |
| When a user's shift is modified the system should automatically contact the user to advise of the modification. Automatic notification should be able to be over-ridden or stopped so the user can be notified manually. |  | R33 |  |
| When a user's shift is modified the system should automatically contact the affected halls to advise of the modification. Automatic notification should be able to be over-ridden or stopped so the user can be notified manually. |  | R34 |  |
| Report to represent all officer movements (equivalent to the current Pool Posting). | Should contain the following information at a minimum:  a) Rank b) Name c) Hall d) Shift e) Moved to: f) Moved From: g) Reason  List should be sorted by seniority. Would like to group the "to" moves first and then the "from" moves. | R35 |  |
| The system should send an alert to the supervisor when an employee reach pre-defined milestones such as the number of absences for performance management. |  | R36 |  |
| **6. Technical** | | | |
| The system should operate on a standard industry-recognized operating system. |  | T1 |  |
| The system should provide a smart phone interface capable of working on iOS, Android Marshmallow (6.0). |  | T2 |  |
| The user interface should scale appropriately based on the size, orientation and screen resolution of the user device. |  | T3 |  |
| Any Web App or Web Interface should operate in modern browsers including Safari, Firefox, Internet Explorer, Microsoft Edge, Google Chrome. |  | T4 |  |
| The system should be capable of transmitting alerts and notification via SMS, SMTP, EMTP or commercial paging. |  | T5 |  |
| The database should be on a standard industry-based database. |  | T6 |  |
| The proponent should allow for annual upgrades of OS and DB. | The proponent should allow for annual upgrades of OS and DB. | T7 |  |
| System proponent should provide application health status alerts to facilitate SNMP monitoring or similar technology. | System proponent should provide application health status alerts to facilitate SNMP monitoring or similar technology. | T8 |  |
| The system should support importing and exporting in XML. | The system should support importing and exporting in XML. | T9 |  |
| The proponent should provide a multiple environment test environment. | There should be at least the following database environments required - Production (LIVE), training and development. | T10 |  |
| Interface from the scheduling system to PeopleSoft e.g. for time entry and; Interface from PeopleSoft to scheduling system – e.g. for personnel data. |  | T11 |  |
| Should have the ability to interface with Business Intelligence tools. |  | T12 |  |
| It should be possible to import scheduling and personnel related data into the scheduling system from other databases or spreadsheets (such as Access database or Excel). |  | T13 |  |
| The system should support the manual or automated extract of data in formats that are usable for all standard applications including, but not limited to: | * .csv * .html * .xml * .rtf * .doc | T14 |  |
| Users should be able to access staffing system through a web interface. |  | T15 |  |
| Users should be able to access staffing system remotely. | Outside the network i.e.: through a firewall | T16 |  |
| Users should be able to access staffing system through smartphone or similar application. |  | T17 |  |
| The system should be capable of supporting multiple agencies within the same server plan/deployment. |  | T18 |  |
| The system should allow the system administrator to limit user access to view and make changes within their own agency or across agencies if deemed appropriate. |  | T19 |  |
| User should be able to change passwords without having to request the change from the System Administrator. |  | T20 |  |
| If the system becomes unusable, the users should be able to have an alternative version of the schedule with the employees in their primary positions. This would establish a “blank” schedule which could be used as a starting point for manually scheduling during disaster recovery. | The users should be able to use a 'blank' form template to record existing staffing and future staffing.  Alternative versions would include Excel spreadsheet and/or printed versions. | T21 |  |
| The proponent should provide the source code, with annual updates. |  | T22 |  |
| Ability to interface with Software Records Management System (RMS). | Interface should include personnel data, for example data relative to certifications or skills. | T23 |  |
| Users should be able to access the system through a telephony system (by phone) or online. |  | T24 |  |
| **7. Corporate** | | | |
| Proponent solution is currently installed in departments of similar size and number of users. | Proponent should be able to provide references. | C1 |  |
| Proponent should offer an extended warranty. |  | C2 |  |
| The proponent should provide a system database schema. |  | C3 |  |
| Proponent should offer annual maintenance packages. |  | C4 |  |
| The proponent should be able to describe the different services and levels of support that are available. |  | C5 |  |
| The proponent should provide product release notes for the version of the software being recommended for use at the time of system implementation. |  | C6 |  |
| System documentation should include both user guides and system administrator guides. |  | C7 |  |
| The proponent should provide technical assistance with the configuration of the system. |  | C8 |  |
| The proponent should provide technical assistance with the implementation of the system. |  | C9 |  |
| System solution should be subject to an internal (proponent) QA process. |  | C10 |  |
| The proponent should provide implementation and project support. |  | C11 |  |
| Proponent should provide 7/24/365 support. | The proponent should provide a web-based knowledge bank. | C12 |  |
| Proponent should track and monitor customer submitted bugs. |  | C13 |  |
| Proponent should provide a single point of contact. |  | C14 |  |
| Proponent should support/provide a user conference. |  | C15 |  |
| The proponent should provide system test plans. | 1. User Acceptance Test Plan  2. Regression Test Plan | C16 |  |
| A predefined process and associated expected timelines for trouble resolution should be provided. |  | C17 |  |
| The proponent should provide user-level training in a train-the-trainer format. |  | C18 |  |
| Users should be able to post information/issues to the web-based bank. |  | C19 |  |
| The proponent should provide a file transfer site. |  | C20 |  |